Time Entry by Supplier on behalf of Contractor

This job aid highlights the key steps required to submit and manage timecards on behalf of a contractor. The Supplier Accounting Representative (SAR) is the only user role that can enter time on behalf of a contractor. Timecards can only be submitted to the Buyer Organization for approval once the contractor's assignment becomes effective and up to 60 days following the weekending date.

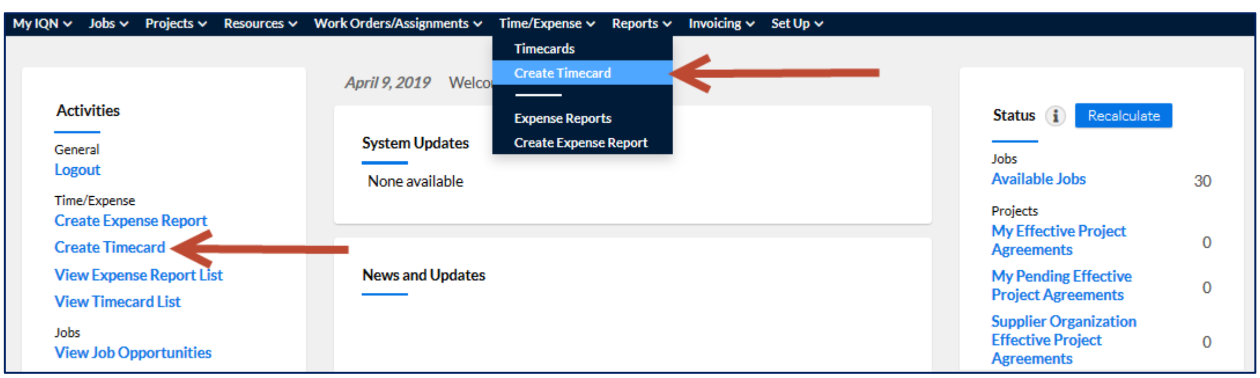
Contents include:

- How to create and submit a timecard (sorted by resource or by organization)
- How to create/view a timecard list
- How to modify a saved or rejected timecard
- How to adjust submitted or approved timecards

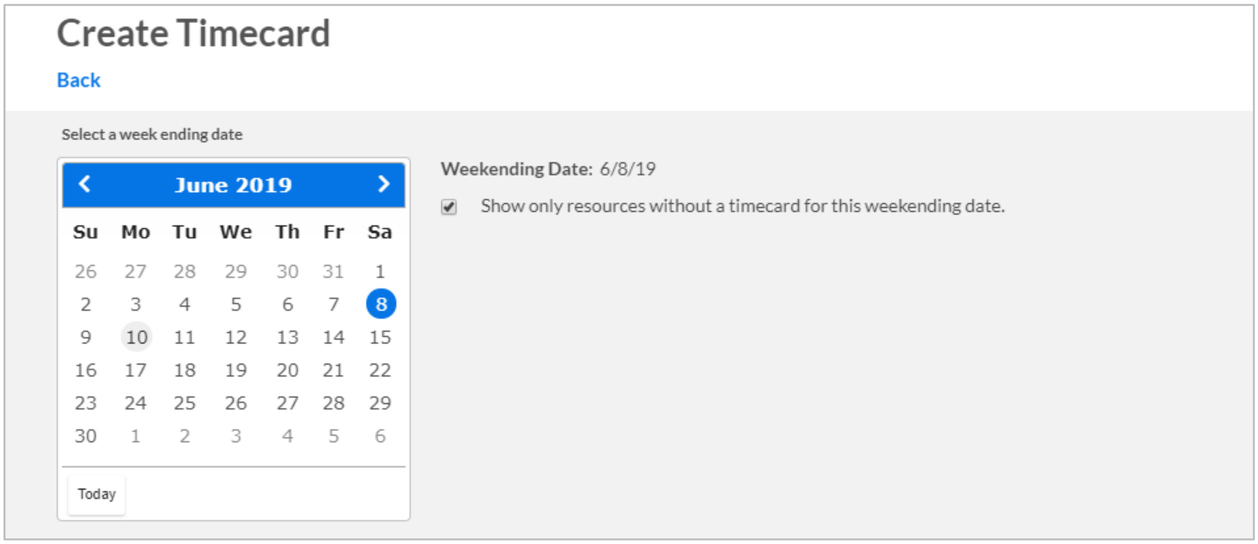
A Timecard Status Chart is also included.

To create a timecard:

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Click the **Create Timecard** hyperlink located in the Activities column on the left-hand side under time/Expense. *Optional*: Expand the Time/Expense pull-down header menu and click **Create Timecard**. The Create Timecard screen displays.



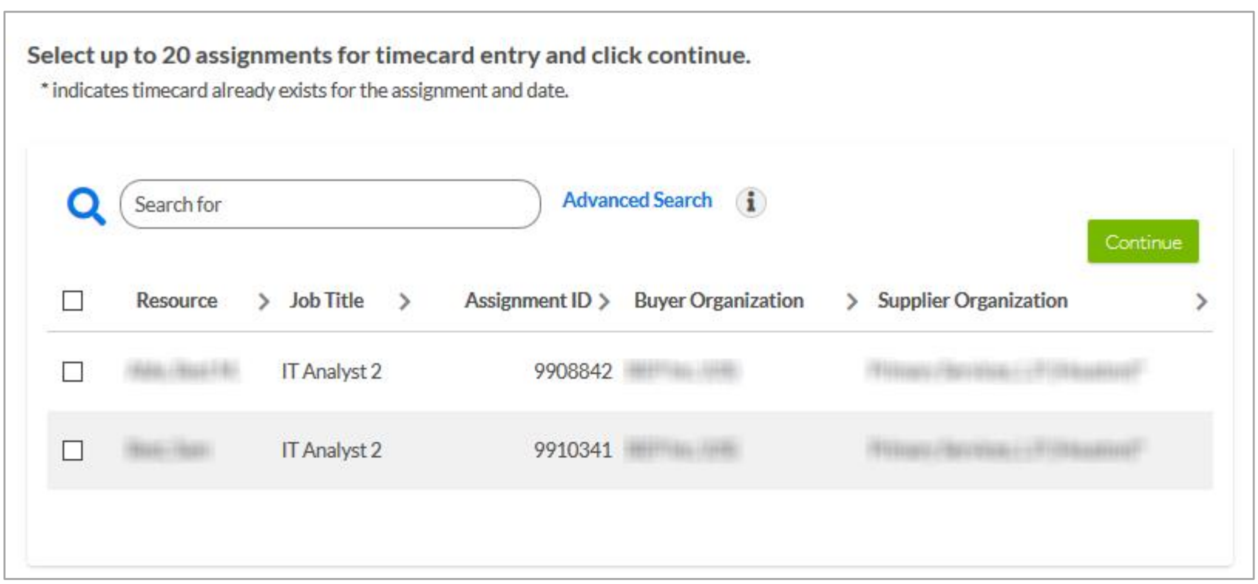
3. Select a specific week for time writing by selecting a weekending date (Saturday) on the calendar.



4. Use the checkbox next to the right of the calendar to limit your selection results to missing timecards only.

"Show only resources without a timecard for this weekending date." is checked by default. Any resource that has previously entered a timecard for any days within the selected week will not display if the box remains checked. This allows you to determine quickly if a timecard has been entered for a particular contractor. If the box is not checked, all resources associated to you will be displayed in the drop-down list. Those resources that already have a timecard for the week will have an asterisk (*) next to their name.

5. Use the checkboxes next to the Resource name to select up to 20 assignments in the displayed assignments list for timecard entry, then click **Continue** (Continue).



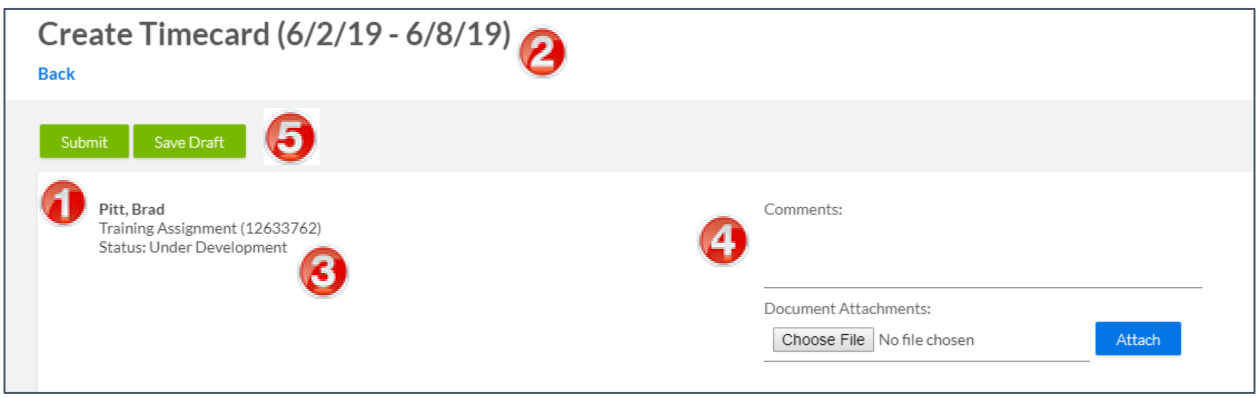
6. The Timecard screen displays.

Timecard Details:

Review the arrangement of the Timecard screen carefully before you enter time! The details will vary based on the timecard template in use by the Buyer Organization. For example:

- Days could be displayed as rows or as columns.
- Separate fields could be displayed for Regular, Overtime, or Double Time hours based on the Rate Card for the job position.
- Time entry could automatically adjust to whole hours, tenths of an hour, quarter hours, or just as entered which allows users to enter time in fractions down to the hundredth of an hour.
- Hours worked might need to be assigned to separate Cost Allocation Codes (CAC) which could be further broken down as CAC1 and CAC2 selections.
- Rate type could be hourly or daily. If daily, the entry will be a checkbox to indicate which days the contractor worked rather than an entry of the number of hours worked each day.
- Total time is calculated as you make entries but these calculations could be rounded up or down.

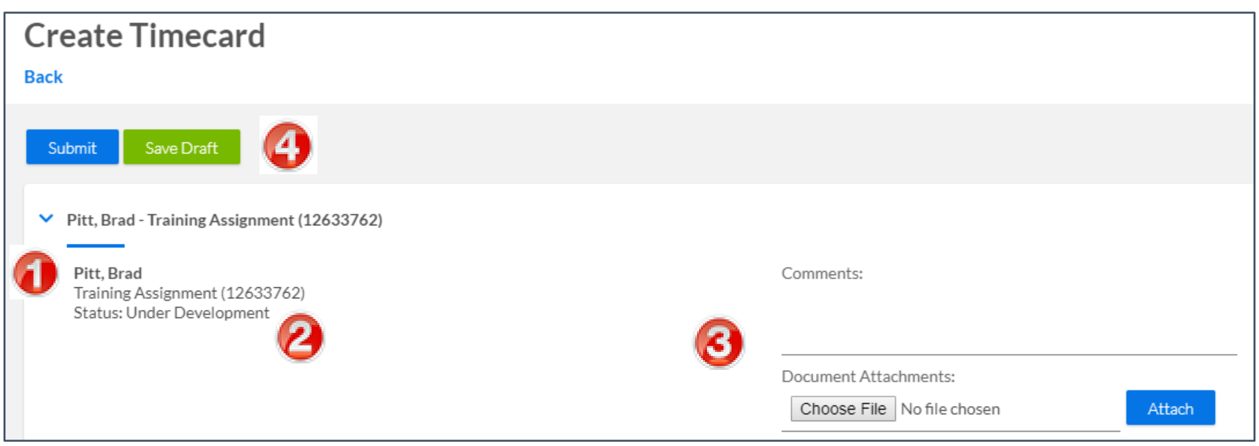
Timecard Header – selection of one assignment



1	Verify the resource/contractor name.
2	Verify the timecard dates. ***NOTE**: Saturday is the weekending day for Shell.*
3	Verify timecard status. ***NOTE**: A Timecard Status List is provided at the end of this document.*

✓	*Optional*. Contractors who need to submit time to more than one buyer organization or for multiple assignments: • **Select an Organization:** Use the drop-down list to select the organization to which you are entering time. Make a separate selection and enter for each organization. • **Select an Assignment:** Use the drop-down list to select the assignment number for which you are entering time. Once you select the assignment, other data might be populated on the timecard and you will be able to enter time for the days of that week on which the contractor worked for each assignment. • **Timecards with Multiple Templates**: If the contractor is working on more than one assignment, the timecard template could vary between buyer organizations. If this occurs, you will see tabs at the top of the screen to indicate that there are multiple templates. Use the buttons labeled 'next' and 'previous' at the top and bottom of the screen to navigate from one timecard template to the next. On each template, use the Timecard Details content to enter your time for each assignment.
4	Enter any general comments/advisories regarding the timecard in the text box. Additional documentation can be attached using the **Browse** and **attach** button links below the Comments section.
5	**Actions**: • Use **Save Draft** if you have made entries on the timecard but are not ready to submit. The timecard status will update to “Under Development”. • Use **Submit** when the timecard is complete and you are ready to send it for approval. • Use **Delete** to remove the timecard. ***NOTE****: The delete button is only visible once a timecard has been saved.* • Use **Back** to exit the Create Timecard screen and return to your prior list.

Timecard Header – multiple assignments:

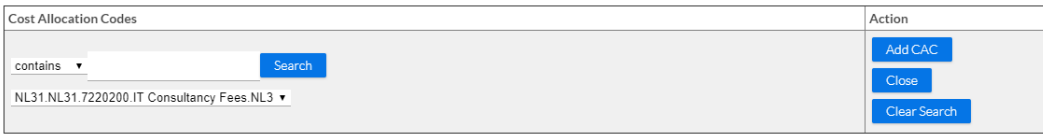


1	Verify the resource/contractor name.
2	Verify timecard status. ***NOTE****: A Timecard Status List is provided at the end of this document.*
✓	*Optional*. Contractors who need to submit time to more than one buyer organization or for multiple assignments: • **Select an Organization:** Use the drop-down list to select the organization to which you are entering time. Make a separate selection and enter for each organization. • **Select an Assignment:** Use the drop-down list to select the assignment number for which you are entering time. Once you select the assignment, other data might be populated on the timecard and you will be able to enter time for the days of that week on which the contractor worked for each assignment. • **Timecards with Multiple Templates**: If the contractor is working on more than one assignment, the timecard template could vary between buyer organizations. If this occurs, you will see tabs at the top of the screen to indicate that there are multiple templates. Use the buttons labeled 'next' and 'previous' at the top and bottom of the screen to navigate from one timecard template to the next. On each template, use the Timecard Details content to enter your time for each assignment.
3	Enter any general comments/advisories regarding the timecard in the text box. Additional documentation can be attached using the **Browse** and **attach** button links below the Comments section.
4	**Actions**: • Use **Save Draft** if you have made entries on the timecard but are not ready to submit. The timecard status will update to “Under Development”. • Use **Submit** when the timecard is complete and you are ready to send it for approval. • Use **Delete** to remove the timecard. ***NOTE****: The delete button is only visible once a timecard has been saved.* • Use **Back** to exit the Create Timecard screen and return to your prior organization list.

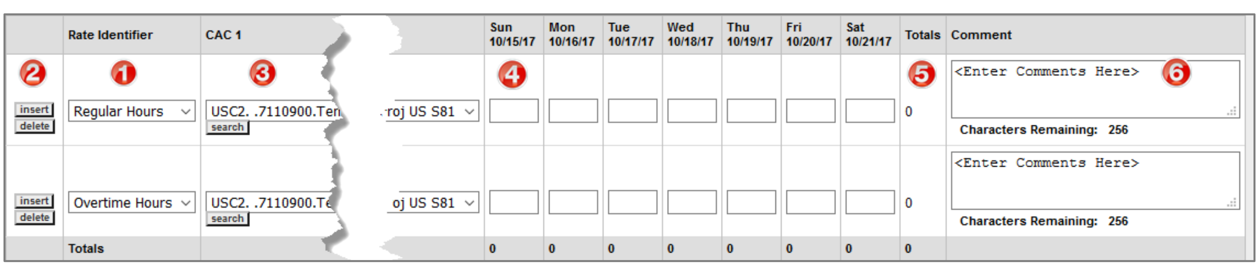
Days displayed as rows:

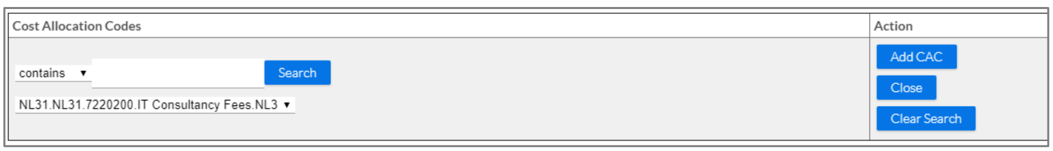
	Day & Date	CAC 1	Regular Hours	Overtime Hours	Totals	Comment
Insert	Sun 10/7/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Mon 10/8/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Tue 10/9/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Wed 10/10/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Thu 10/11/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Fri 10/12/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
Insert	Sat 10/13/18	NL31.NL31.7220200.IT Consultancy Fees.NL3 ▾ Search			0	<Enter Comments Here> Characters Remaining: 256
	Totals		0	0	0	

1	Each row represents a Day & Date. If you need to divide your daily hours between multiple CACs (Cost Allocation Codes), you will need to insert a separate row for each CAC. You may only enter time for the date range that the assignment is effective.
2	Use the insert (Insert) button to add more rows for the same Day & Date. Once you <insert> a row, you will also see an option to be able to <delete> it. Use the 'select all' or 'clear all' buttons to quickly add or remove multiple lines to a timecard. ***NOTE****: You can delete any line that you insert but you cannot remove the original line for any individual day.*

3	Use the pull-down selection list to select the appropriate CAC for the time you need to enter. *Note: The Cost Allocation Codes are the buyer organization's accounting charge codes.* Some timecard settings may have a **search** button instead of a selection list. To search for a cost allocation code, click the **search** button. The screen refreshes to display a search layout.  Select if you wish to perform a 'starts with' or a 'contains' search. If you select 'starts with' the system will only look for cost allocation code values that begin with the search criteria that you enter. If you select 'contains' the system will look for cost allocation code values that contain the search criteria that you enter anywhere in the code string. Enter your search criteria and click 'search'. IQNavigator will display a list of the cost allocation codes that match your search in the drop down list. Then choose the appropriate value and click either 'add CAC' or 'close' in the Action column to add it to your timecard. To clear a search, click the 'clear search' button. Repeat this process for each additional CAC you need.
4	Enter the contractor's hours into the appropriate column for Regular Hours.
5	Enter any Overtime Hours worked in the designated column. Columns for Overtime and Double Overtime Hours will only display if these rates are included in the Rate Card.
6	As you enter hours, "total" numbers will auto-populate in the Totals column. A combined total displays at the bottom of the column. *Note: Calculations will only update once you <click> outside the Hours entry box.*
7	Use the Comment box to enter any message/clarification needed. *Note: These comments are intended for specific line items. Any overall comment should be entered in the Comments box in the timecard header.*

Days displayed as columns:



1	Each row represents a Rate Identifier type (e.g., Regular Hours, Overtime Hours.) If you need to divide your Regular/Overtime hours between multiple CACs (Cost Allocation Codes), you will need to insert a separate row for each CAC. *Note: The pull-down selection options for Rate Identifier will match the options on the Rate Card.*
2	Use the insert (Insert) button to add more rows for the same Rate Identifier. Once you <insert> a row, you will also see an option to be able to <delete> it.
3	Use the pull-down selection list to select the appropriate CAC for the time you need to enter. *Note: The Cost Allocation Codes are the buyer organization's accounting charge codes.* Some timecard settings may have a **search** button instead of a selection list. To search for a cost allocation code, click the **search** button. The screen refreshes to display a search layout.  Select if you wish to perform a 'starts with' or a 'contains' search. If you select 'starts with' the system will only look for cost allocation code values that begin with the search criteria that you enter. If you select 'contains' the system will look for cost allocation code values that contain the search criteria that you enter anywhere in the code string. Enter your search criteria and click 'search'. IQNavigator will display a list of the cost allocation codes that match your search in the drop down list. Then choose the appropriate value and click either 'add CAC' or 'close' in the Action column to add it to your timecard. To clear a search, click the 'clear search' button. Repeat this process for each additional CAC you need.
4	Enter the contractor's hours into the appropriate **column** for the Day & Date. You may only enter time for the date range that the assignment is effective.
5	As you enter hours, "total" numbers will auto-populate in the Totals column. A combined total displays at the bottom of the column. *Note: Calculations will only update once you <click> outside the Hours entry box.*
6	Use the Comment box to enter any message/clarification needed. *Note: These comments are intended for specific line items. Any overall comment should be entered in the Comments box in the timecard header.*

To submit a timecard:

1. Complete Steps 1 through 3 as listed in the "create a timecard" section above.
2. Use the instructions in the Timecard Details section to fill in all necessary timecard information.
3. Click **Submit** (Submit) when the timecard is complete and ready to send for approval. A system message displays to confirm the timecard has been submitted.

Once submitted, IQNavigator will display the timecard's number as well as the names of the individuals responsible for approving it. If the timecard has more than one assignment it is likely that IQNavigator will create multiple timecards so that they can be routed to the appropriate people for approval. You do not have to enter time for all of the assignments or days on the timecard before you can submit it.

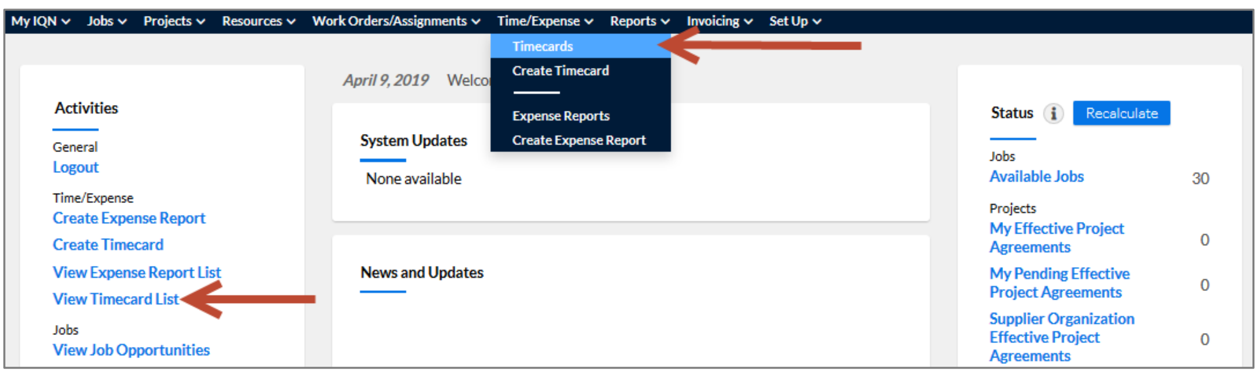
If IQNavigator finds problems with your timecard error messages will be shown telling you what needs to be corrected.

You will receive a system notification to let you know whether the timecard was approved or rejected by the approver. If rejected, the timecard is then available to modify and re-submit.

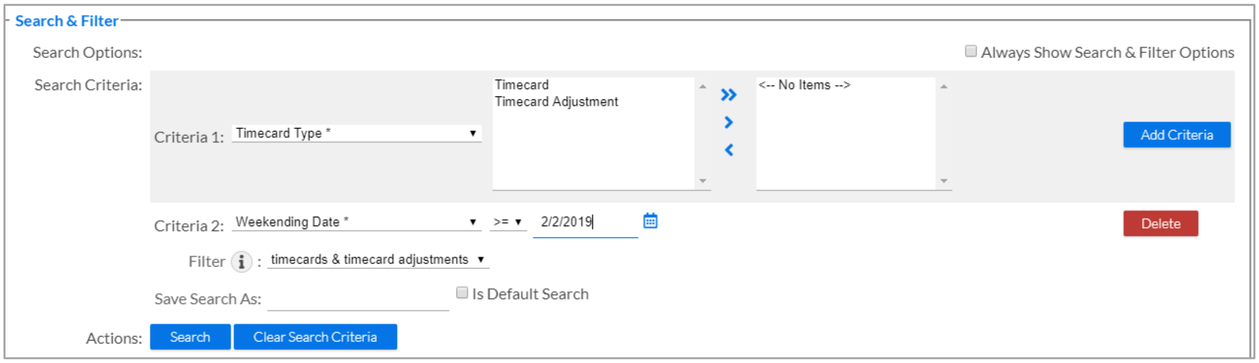
4. *Optional*: Use the **retract approval request** option to make changes to a timecard AFTER it is submitted but BEFORE it is approved. Once a timecard is approved or rejected, you will need to follow the modify or adjustment instructions provided in sections below.

To create/view a timecard list:

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Click the **View Timecard List** hyperlink located in the Activities column on the left-hand side under Time/Expense. *Optional*: Expand the Time/Expense pull-down header menu and click **Timecards**. The Timecard list screen displays.



3. Use the Search & Filter options to select your search criteria settings. Use the pull-down selection list for Criteria 1 to select the primary category of timecards you wish to view. The screen will refresh to display which search options match your Criteria 1 selection. Use the 'add criteria' button on the far right to add more criteria options to your search query.
In the example below, the search query is set to create a list of timecards from the first week in February 2019 to the present that have been returned for adjustments.

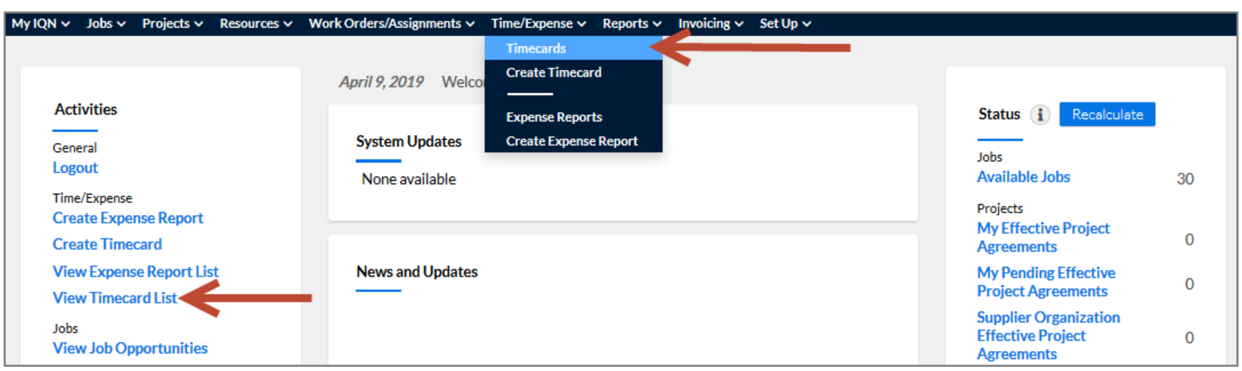


4. Click **Search** (Search) and the matching results will display in a list below the Search & Filter section. A message displays if no records match your search criteria.
5. Once you have a results list, expand the drop-down selection list in the Action column to view what actions you may take for any item in the list. This Actions list will vary based on the status and record type. For example, an approved timecard will display an Actions list that includes adjust, print, view, and view history.

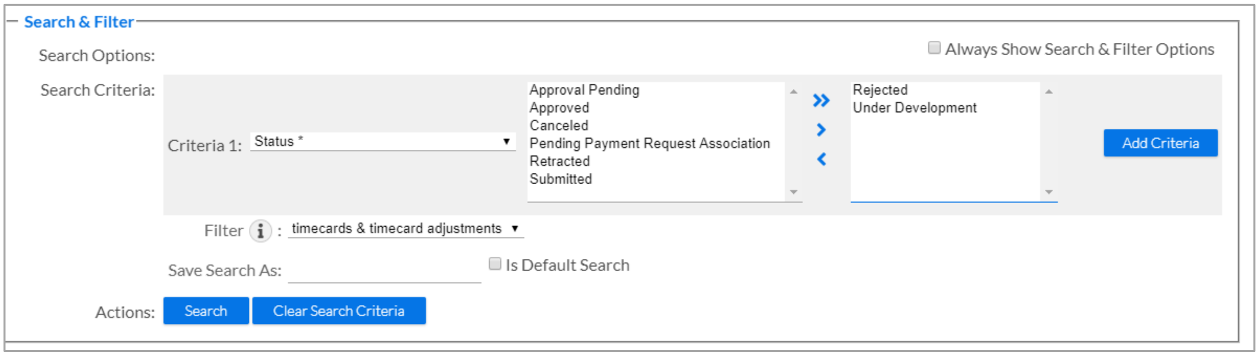
To modify a timecard:

NOTE*: Only a timecard with a status of "Under Development" or "Rejected" can be modified.*

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Click the **View Timecard List** hyperlink located in the Activities column on the left-hand side under Time/Expense. *Optional*: Expand the Time/Expense pull-down header menu and click **Timecards**. The Timecard list screen displays.



3. Use the Search & Filter options to set Criteria 1 to Status. Use the select button to make Rejected and Under Development your search criteria. *Optional*: Add search criteria if you have more details and can narrow your search so the results list only contains the timecards you need to modify.



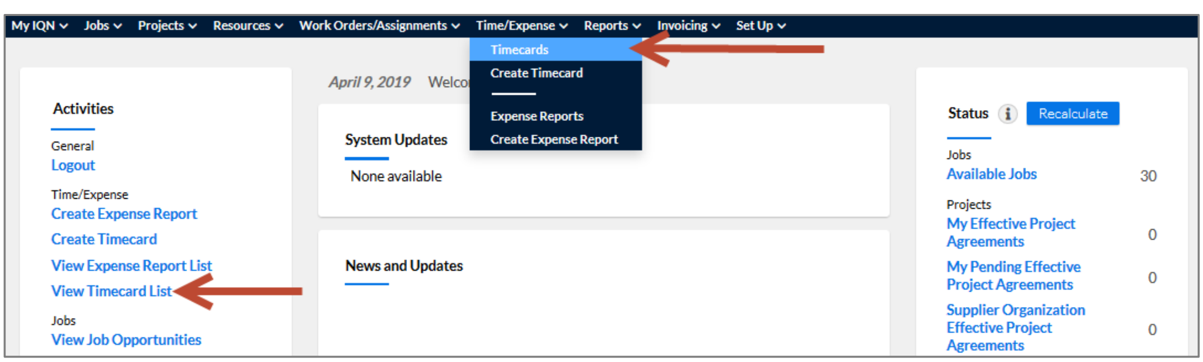
4. Click **Search** (Search) to create a list of matching timecards.
5. Review the timecard list and either click the Timecard Number hyperlink —OR— select **modify** from the Action column drop-down selection list and click the GO arrow (➜). The Timecard entry screen displays. Check for any comments the Approver may have provided.
6. Follow the instructions in the Timecard Details section above to make all necessary modifications.
7. Click **Submit** (Submit) when the changes are complete and ready to send to the approver. A system message displays to confirm the timecard has been submitted.

You will receive a system notification to let you know whether the modified timecard was approved or rejected. If rejected, the timecard becomes available to modify once again and re-submit.

To make a timecard adjustment:

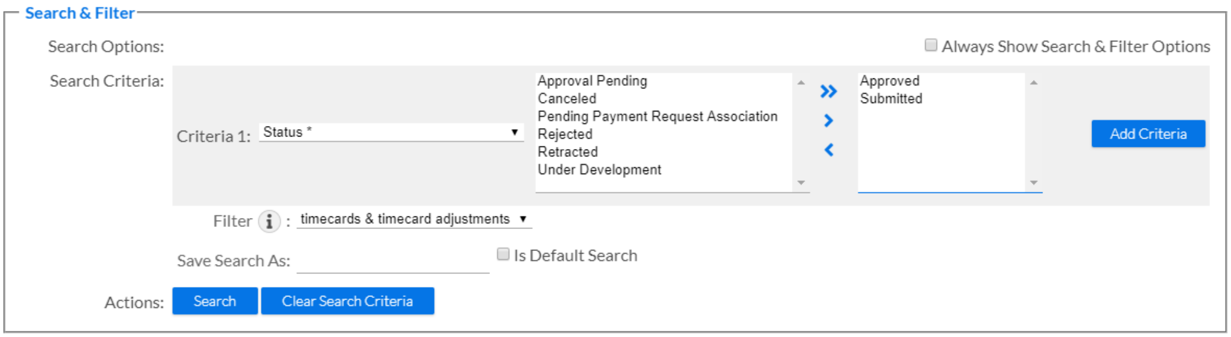
NOTE*: Only a timecard with a status of "Submitted" or "Approved" can be adjusted.*

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Click the **View Timecard List** hyperlink located in the Activities column on the left-hand side under Time/Expense. *Optional*: Expand the Time/Expense pull-down header menu and click **Timecards**. The Timecard list screen displays.



3. Use the Search & Filter options to set Criteria 1 to Status. Use the select button to make Submitted and Approved your search criteria. *Optional*: Add search criteria if you have more

details and can narrow your search so the results list only contains the timecards you need to adjust.



4. Click **Search** (Search) to create a list of matching timecards.

5. Review the timecard list and either click the Timecard Number hyperlink —OR— select **adjust** from the Action column drop-down selection list and click the GO arrow (➜). The Timecard **adjustment** screen opens. ⚠ **Notice that all time entry content is <read only>.**

	Day & Date	Cost Allocation Code	Regular Hours	Overtime Hours	Totals	Comment
Adjust	Sun 12/2/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours			0	<Enter Comments Here>
Insert Adjust	Mon 12/3/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>
Insert Adjust	Tue 12/4/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>
Insert Adjust	Wed 12/5/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>
Insert Adjust	Thu 12/6/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>
Insert Adjust	Fri 12/7/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>
Adjust	Sat 12/8/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours			0	<Enter Comments Here>
	Totals		40	0	40	

6. Click **Adjust** (Adjust) in any line item that needs changes. Use the insert (Insert) option if you need to an additional editable line for that entry.

7. Notice that the screen adjusts so that you can now make time entries. Any new entries will override the previous time submitted/approved. All changes to hours will display **in bold** beneath the new entries. The Comments column remains <read only>. If you need to provide comments, use the Comments text box in the Timecard header section.

Insert	Mon 12/3/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8 Change to Hours: 0	<Enter Comments Here>
Insert Adjust	Tue 12/4/18	NL01. .A7260110. .000028744164.HIL Timewriting Cluster hours	8		8	<Enter Comments Here>

8. Make all necessary adjustments to the timecard. Check for any comments the Approver may have provided. Use the **Save Draft** button if you need more time to make the adjustments.

9. Click **Submit** (Submit) when the changes are complete and ready to send back to the approver. A system message displays to confirm the timecard has been re-submitted.

You will receive a system notification to let you know whether the timecard adjustment was approved or rejected. If rejected, the timecard becomes available to adjust once again and re-submit.

Timecard Status Chart:

Timecard Status		
Supplier Firm	Description	Buyer Org
Approval Pending	The timecard has been submitted and is pending approval on the buyer side by the Timecard Approver	Approval Pending
Approved	The timecard has been approved by the Timecard Approver	Approved
Canceled	The timecard has been canceled and cannot be used	Canceled
Pending Payment Request Association	Timecard has been submitted but not yet consolidated to submit for a Project Payment Request.	Pending Payment Request Association
Rejected	The Timecard Approver has rejected/not approved the timecard and it has been returned to the contractor to make revisions	Rejected
Retracted	The contractor has retracted the request for approval for their timecard in order to make revisions prior to approval	Retracted
Submitted	The timecard has been submitted by the contractor or supplier on behalf of the contractor for approval	Submitted
Under Development	Timecard has been created but not submitted for approval	N/A